HealthFocus
INTERNATIONAL

PROCESSED FOODS & BEVERAGES
2018 Global Topic Report – Detailed Outline

This 2018 report from HealthFocus International takes a deeper look at shoppers' attitudes & actions related to processed foods & beverages, additives and preservatives—globally, regionally and across 22 individual countries—to help companies better understand shopper motivations and opinions, allowing them to connect more powerfully with their targets and bring market solutions faster and more profitably.

MARKETS:

The following regions and countries are covered within the report:

- NORTH AMERICA: USA and Canada
- LATIN AMERICA: Brazil, Mexico, Colombia, and Argentina
- EUROPE: France, Germany, UK and Russia
- WEST ASIA: Saudi Arabia and Turkey
- SOUTH ASIA: India and Pakistan
- EAST ASIA PACIFIC: Australia, China, Indonesia, Japan, Philippines, S. Korea, Thailand, and Vietnam

TABLE OF CONTENTS:

TOPICS COVERED:

- **Processed Foods and Beverages — Barriers vs. Benefits**
    - How concerned are shoppers about processed foods? Which markets are most concerned?
    - Has avoiding processed foods/beverages become more important in their diet over the past year? Globally, how does this trend compare to other key

dietary changes like sugar reduction, clean eating, adding protein, plant-based eating, etc.?

- How many shoppers have decreased their use of processed foods over the last two years?
- Are shoppers willing to pay up to 10% more for foods or beverages that are less processed?
- Brand influence: How important is "minimally processed" in influencing shoppers to try a different brand food or beverage?
- Brand influence for children: How important is "minimally processed" in getting parents to purchase products for their children?
- Negative associations: Which of the following do shoppers feel apply to processed foods/beverages?
    - Less healthy
    - Contains ingredients I don't want
    - May be contaminated through processing facilities and storage
    - Changes the food/beverage to something less real
    - Less clean
- Positive associations: Which of the following do shoppers feel apply to processed foods/beverages?
    - Has a longer shelf life
    - Are more convenient
    - Helps preserve some nutrients
    - Can make a food/beverage healthier (e.g., removing fat or sugar)
    - Can make a food/beverage safer
    - Can make a food/beverage better through fortification
    - Can make a food/beverage better by activating nutrients (e.g., fermentation)

- **Avoiding Food & Beverage Additives**
    - Brand influence: How important is "no additives" in influencing shoppers to try a different brand food or beverage?
    - Do shoppers think that using no additives makes foods and beverages seem a lot healthier?
    - Simple & recognizable ingredients:
        - Do shoppers think recognizable ingredients makes foods and beverages seem a lot healthier?
        - Attitudes:
            - Do they think it is important on a food ingredient label that most of the ingredients are things they recognize and would use at home?
            - Do they believe a food or beverage is more natural if there are fewer ingredients on the label?
        - Actions:
            - How many shoppers are actively choosing foods/beverages because they contain only ingredients that they recognize?

        - How many shoppers are actively looking for products that have fewer ingredients on the ingredient list?
    - Brand influence: How important are the following factors in influencing shoppers to try a different brand food or beverage?
        - Recognizable ingredients
        - Has fewer ingredients on the label
    - Brand influence for children: How important are the following factors in getting parents to purchase products for their children?
        - Recognizable ingredients
        - Has fewer ingredients on the label
    - Which additives are most concerning to shoppers? How concerned are they about the following?
        - Food preservatives
        - Food colorings
        - Artificial sweeteners
        - Artificial flavors
        - Sugar
        - Sodium
        - Low-calorie sweeteners
        - Trans fats
        - Saturated fats
        - Hydrogenated oils
        - Gluten
- Avoiding artificial
    - Are shoppers intentionally avoiding foods/beverages with artificial ingredients?
    - How often are they selecting foods/beverages because they contain no artificial ingredients?
    - Are they willing to pay up to 10% more for foods or beverages that are free from artificial ingredients?
    - Brand influence: How important are the following factors in influencing shoppers to try a different brand food or beverage?
        - No artificial colors or flavors
        - No artificial sweeteners
    - Labeling importance: How important are the following statements on labels?
        - "No artificial colors"
        - "No artificial flavors"
        - "No artificial sweeteners"
        - "Natural flavors"
        - "MSG free/No MSG Added"

- **Attitudes & Actions Towards Preservatives**
    - How concerned are shoppers about food preservatives?

- Are shoppers actively choosing foods/beverages because they contain no preservatives?
- Are they willing to pay up to 10% more for foods or beverages that are free-from preservatives?
- Has avoiding preservatives become more important in their diet over the past year? Globally, how does this trend compare to other key dietary changes like sugar reduction, clean eating, adding protein, plant-based eating, etc.?
- Do they think using less or no preservatives makes foods and beverages seem a lot healthier?
- Labeling importance: How important is "no preservatives" on labels? Globally, how does it compare to other label claims?
- Brand influence: How important is "no preservatives" in influencing shoppers to try a different brand food or beverage? Globally, how does it compare to other brand influences?
- Brand influence for children: How important is "no preservatives" in getting parents to purchase products for their children?

- **Global Demographic Overview**
  - Overview of attitudes & actions towards processed foods & beverages—additives & preservatives compared across key demographic groups:
    - Gender
    - Age
    - Households with Children

- **Sizing the Markets — A View of the Target Shoppers**
  - This section explores three target shopper groups to see how they differ from Total Shoppers and sizes them within each region and country.
  - Groups are defined as follows:
    - **Avoiding Processed**: They are extremely or very concerned about processed foods AND are willing to pay up to 10% more for foods or beverages that are less processed
    - **Free-From Seekers**: No additives is an extremely or very important factor in influencing them to try a different brand food or beverage AND they believe using no additives makes foods and beverage seem "a lot" healthier AND they always or usually choose foods/beverages because they contain only ingredients that they recognize AND they always or usually look for products that have fewer ingredients on the ingredient list
    - **Anti-Preservatives**: They always or usually choose foods/beverages because they contain no preservatives AND are willing to pay up to 10% more for foods or beverages that are free-from preservatives AND they are extremely or very concerned about food preservatives

- **Appendix - Individual Country Snapshots**

- Individual Country Snapshots for all 22 countries providing a quick overview of shopper attitudes & actions on the country level.